

1 INTRODUCTION

Overview

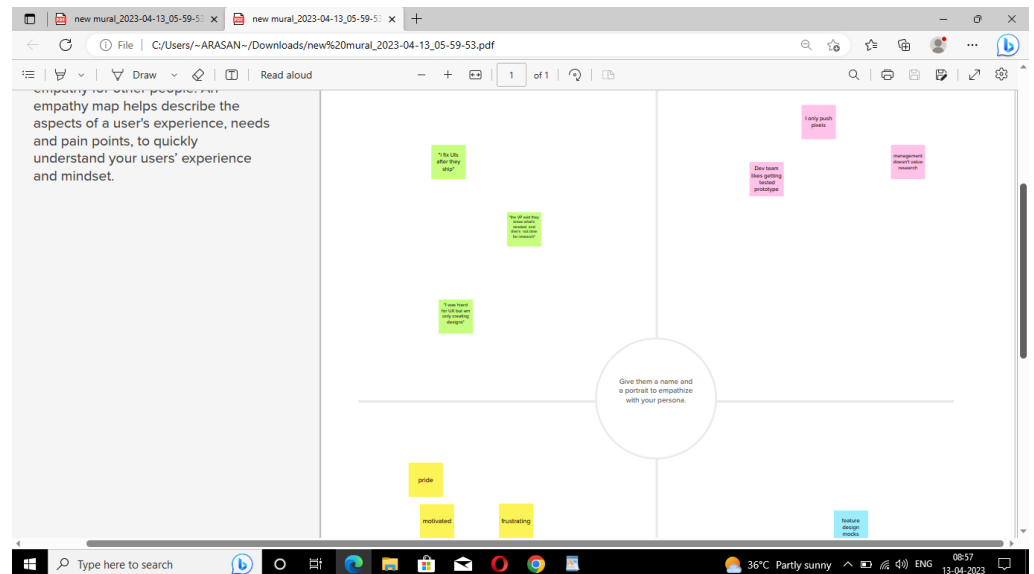
Customer relationship management or CRM software enables educational institutions such as schools , colleges and universities to manage relationships with students , parents , staff , alumni , and other stakeholders. It handles all aspects of the entire student lifecycle , from enrollment , and academic progress tracking to fundraising management and reporting tools.

Purpose

Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers , streamline processes , and improve profitability

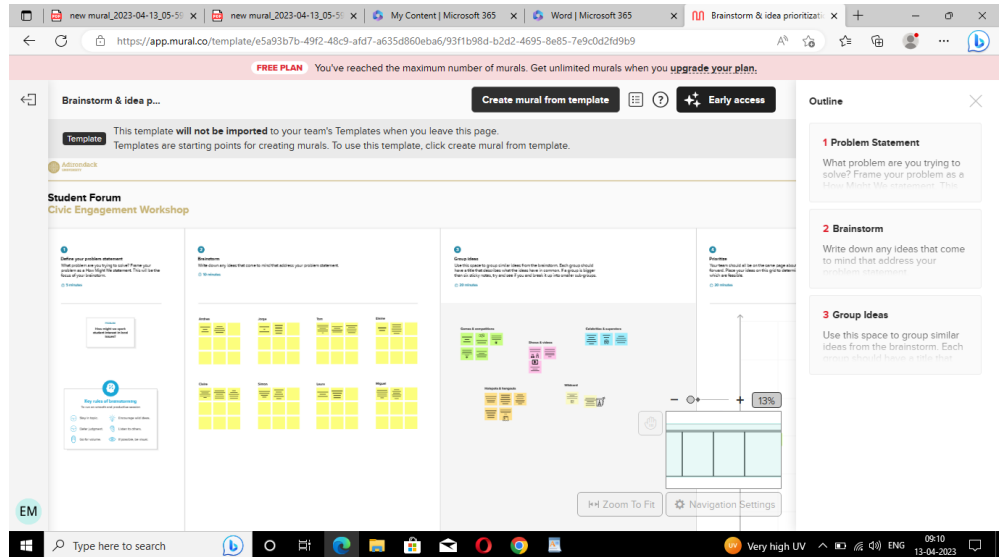
2 Problem Definition & Design Thinking

Empathy Map



Ideation & Brainstorming Map

Project Report Template



3

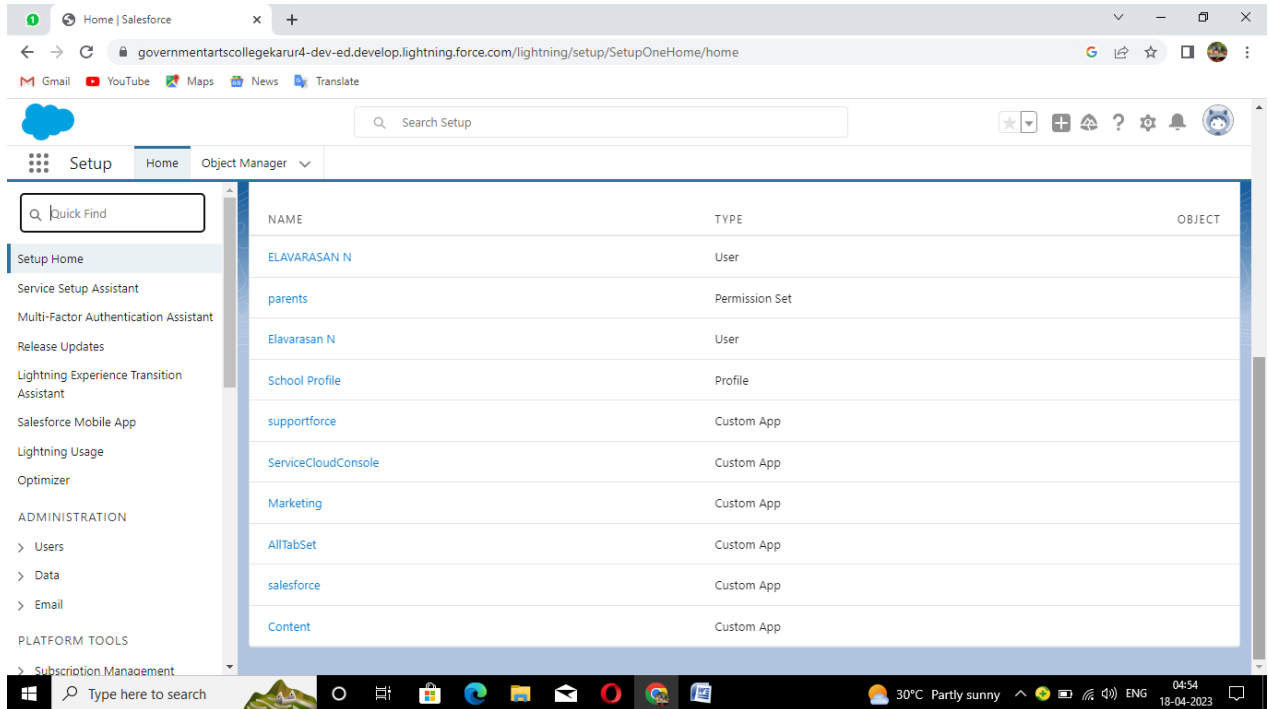
RESULT

Data Model:

Object name	Fields in The Object
obj1 Schools	
	Field label
	Data type
	Address Text Area
	No Of Students Role up summary
obj2 Students	Highest Mark Role up summary
	Field label
	Data type
	Results Pick list
Obj3 Parents	Class Number
	Mark Number
	Field label
	Data type
	Parent Address Text Area
	Parent Number Phone

Activity & Screenshot

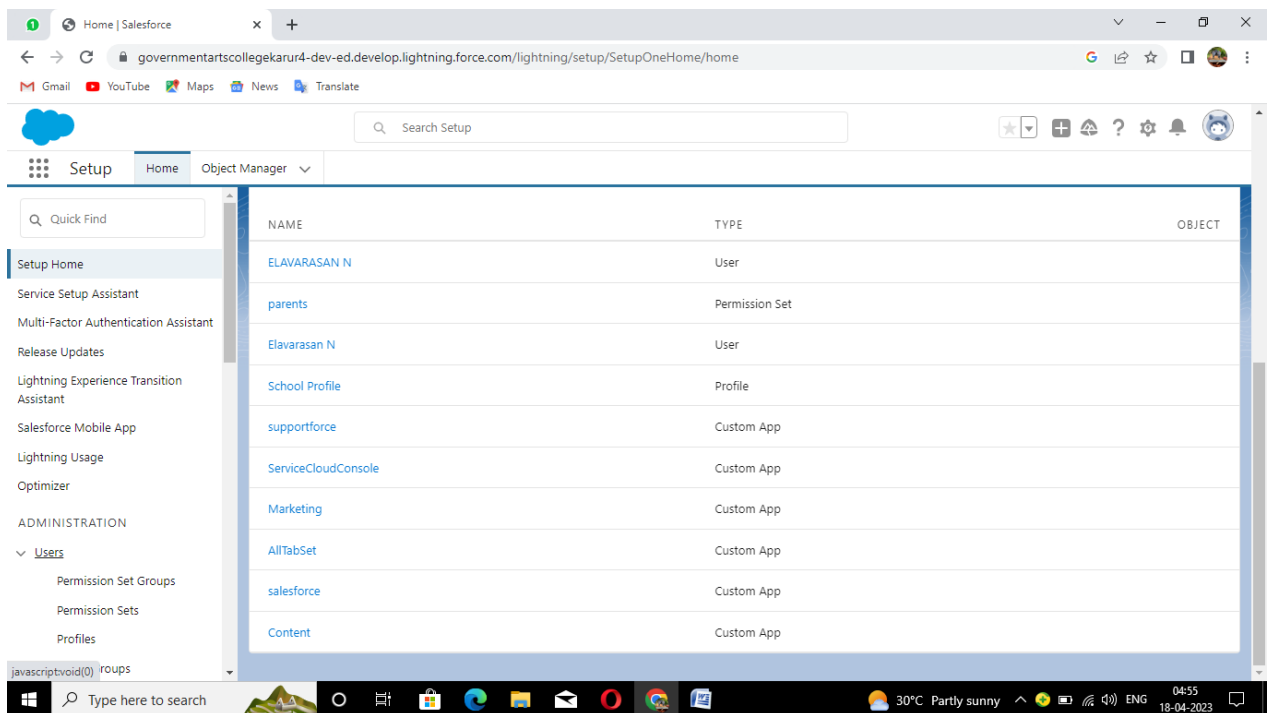
Attach the screenshots of your project activity along with the description.



The screenshot shows the Salesforce Setup Home page. The left sidebar contains a 'Quick Find' search bar and a list of setup categories: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-items Users, Data, Email), and PLATFORM TOOLS (with sub-item Subscription Management). The main content area displays a table of objects.

NAME	TYPE	OBJECT
ELAVARASAN N	User	
parents	Permission Set	
Elavarasan N	User	
School Profile	Profile	
supportforce	Custom App	
ServiceCloudConsole	Custom App	
Marketing	Custom App	
AllTabSet	Custom App	
salesforce	Custom App	
Content	Custom App	

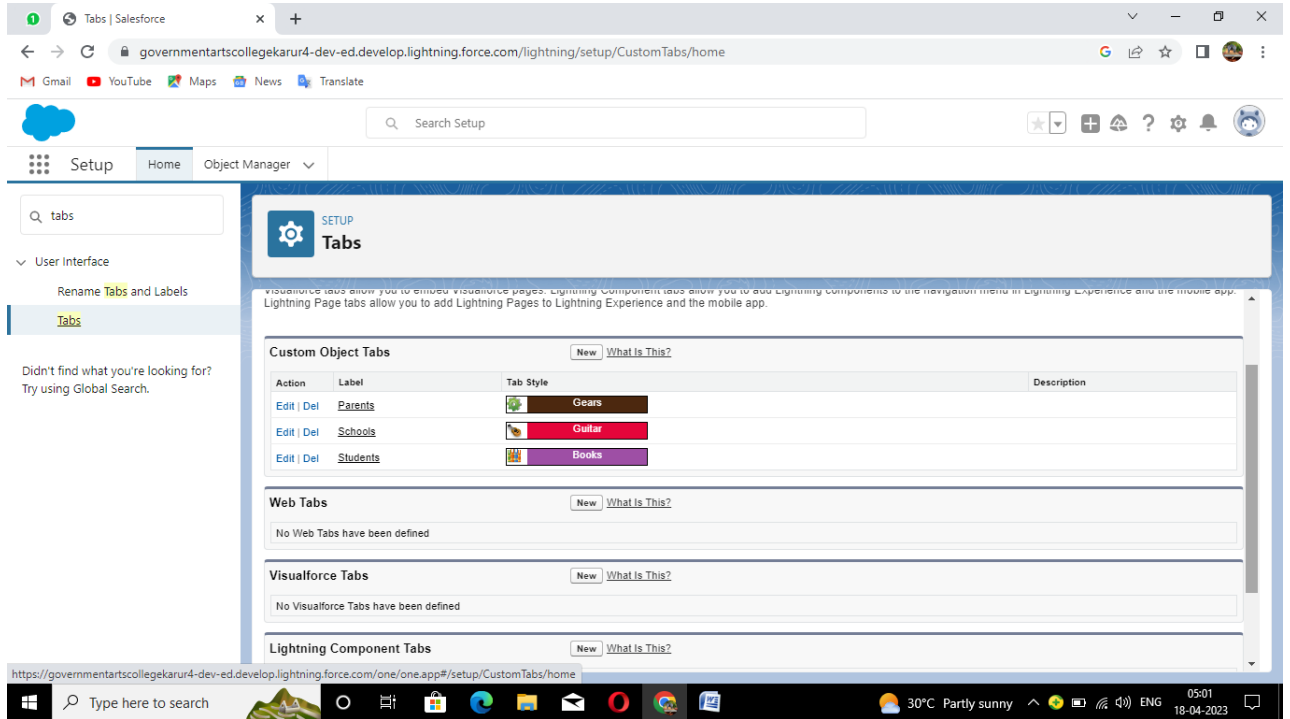
The Windows taskbar at the bottom shows the search bar, taskbar icons, system tray with weather (30°C Partly sunny), language (ENG), and date/time (04:54 18-04-2023).



This screenshot is similar to the first one, but the 'ADMINISTRATION' category in the left sidebar is expanded, showing sub-items: Users, Permission Set Groups, Permission Sets, and Profiles. The main content area table remains the same.

NAME	TYPE	OBJECT
ELAVARASAN N	User	
parents	Permission Set	
Elavarasan N	User	
School Profile	Profile	
supportforce	Custom App	
ServiceCloudConsole	Custom App	
Marketing	Custom App	
AllTabSet	Custom App	
salesforce	Custom App	
Content	Custom App	

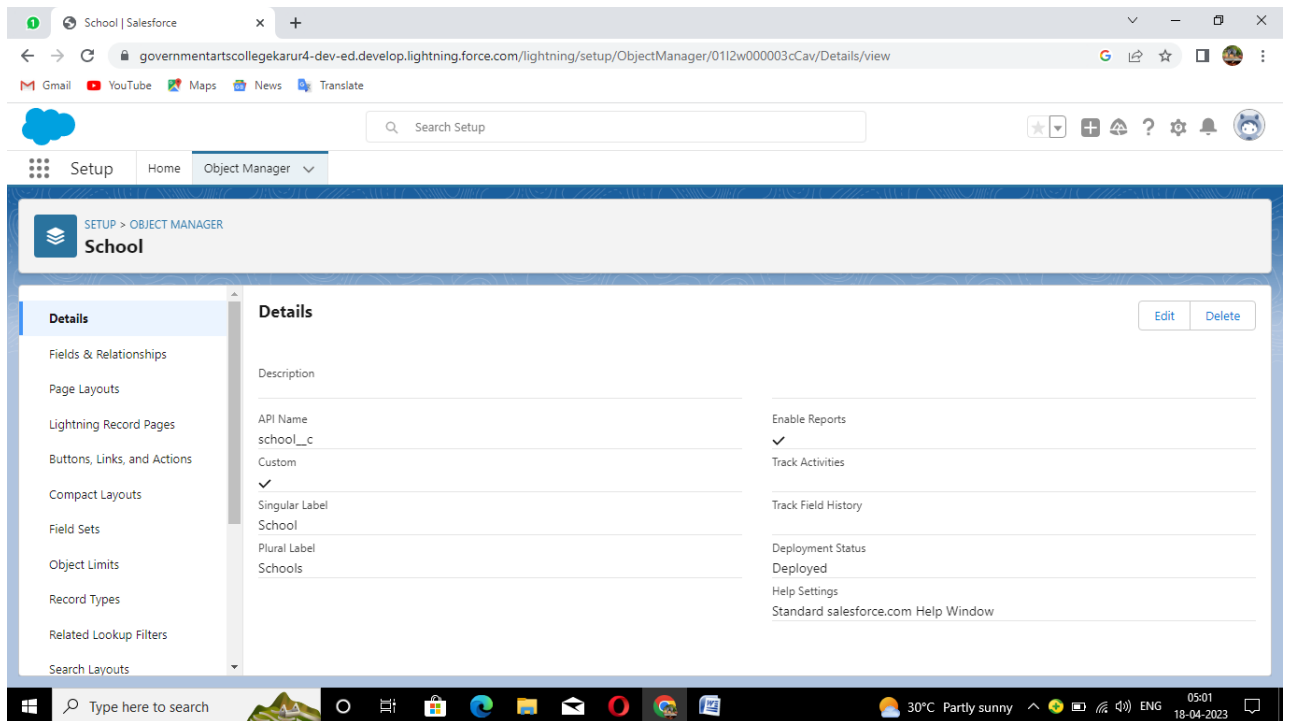
The Windows taskbar at the bottom shows the search bar, taskbar icons, system tray with weather (30°C Partly sunny), language (ENG), and date/time (04:55 18-04-2023).



The screenshot shows the Salesforce Setup interface for the 'Tabs' section. The left sidebar contains a search bar and a navigation menu with 'User Interface' expanded, showing 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'SETUP Tabs' and includes a description of tabs. Below this, there are three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section contains a table with the following data:

Action	Label	Tab Style	Description
Edit Del	Parents	Gears	
Edit Del	Schools	Guitar	
Edit Del	Students	Books	

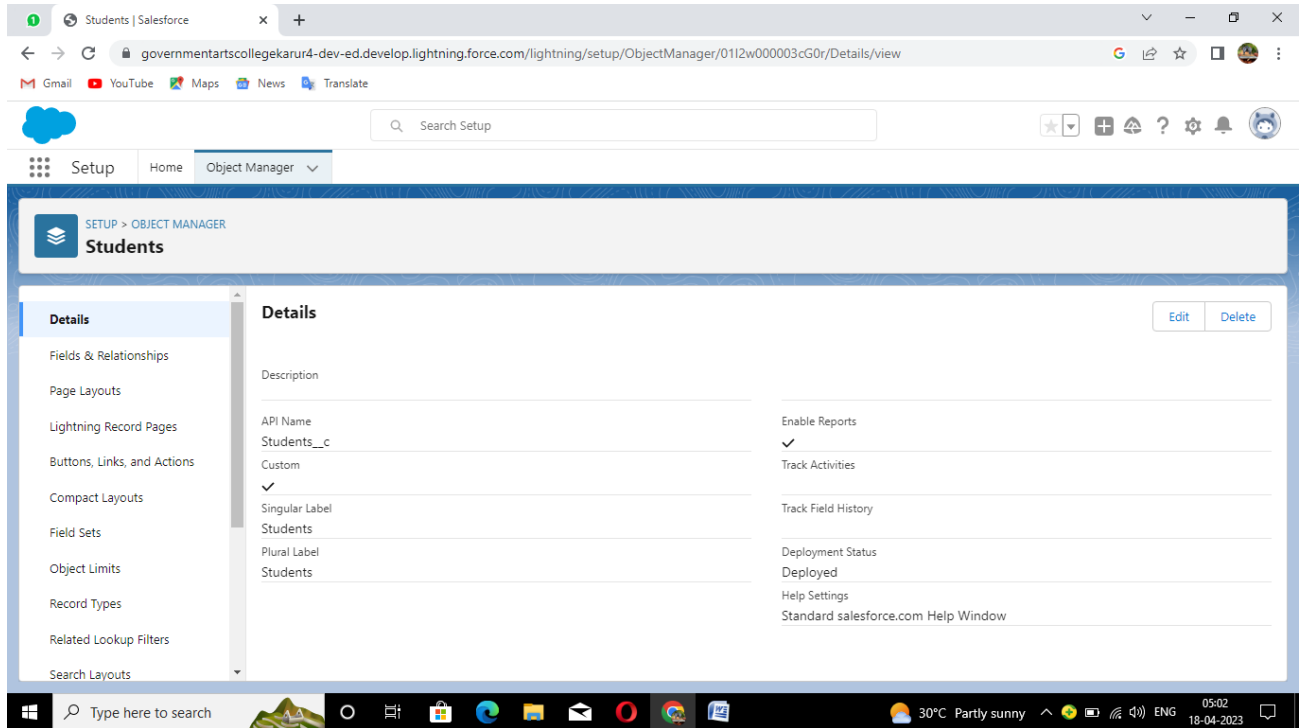
The 'Web Tabs' and 'Visualforce Tabs' sections both indicate that no tabs have been defined. The 'Lightning Component Tabs' section is also visible at the bottom.



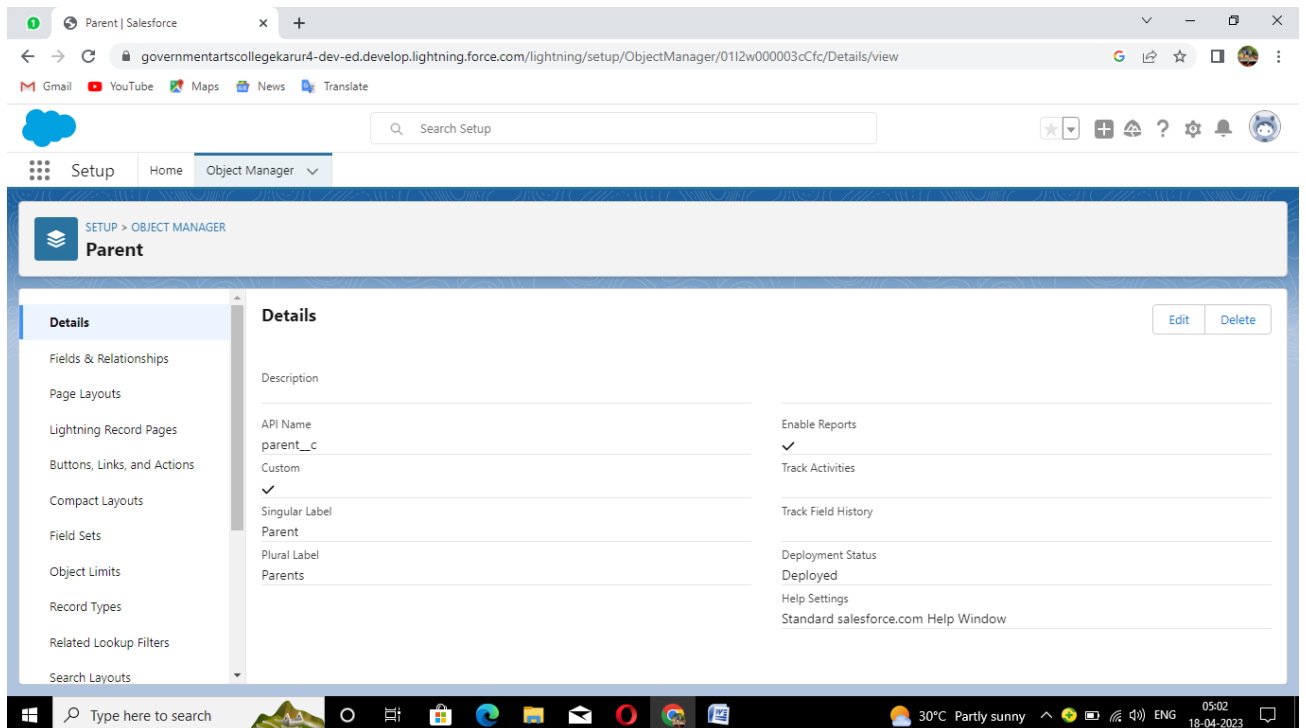
The screenshot shows the Salesforce Setup interface for the 'Object Manager' section, specifically the 'Details' page for the 'School' object. The left sidebar contains a search bar and a navigation menu with 'Object Manager' expanded, showing 'Details' and 'Fields & Relationships'. The main content area is titled 'SETUP > OBJECT MANAGER School' and includes a 'Details' section with the following information:

Field	Value
Description	
API Name	school__c
Custom	✓
Singular Label	School
Plural Label	Schools
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

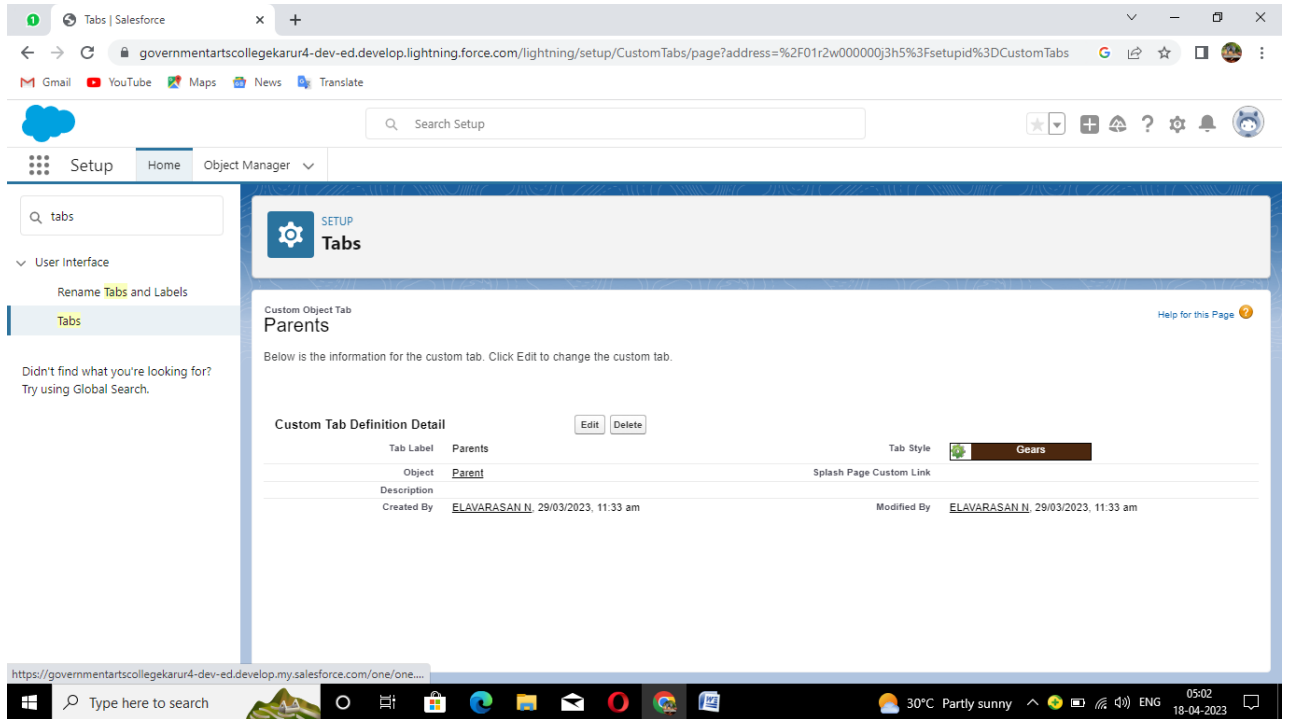
Project Report Template



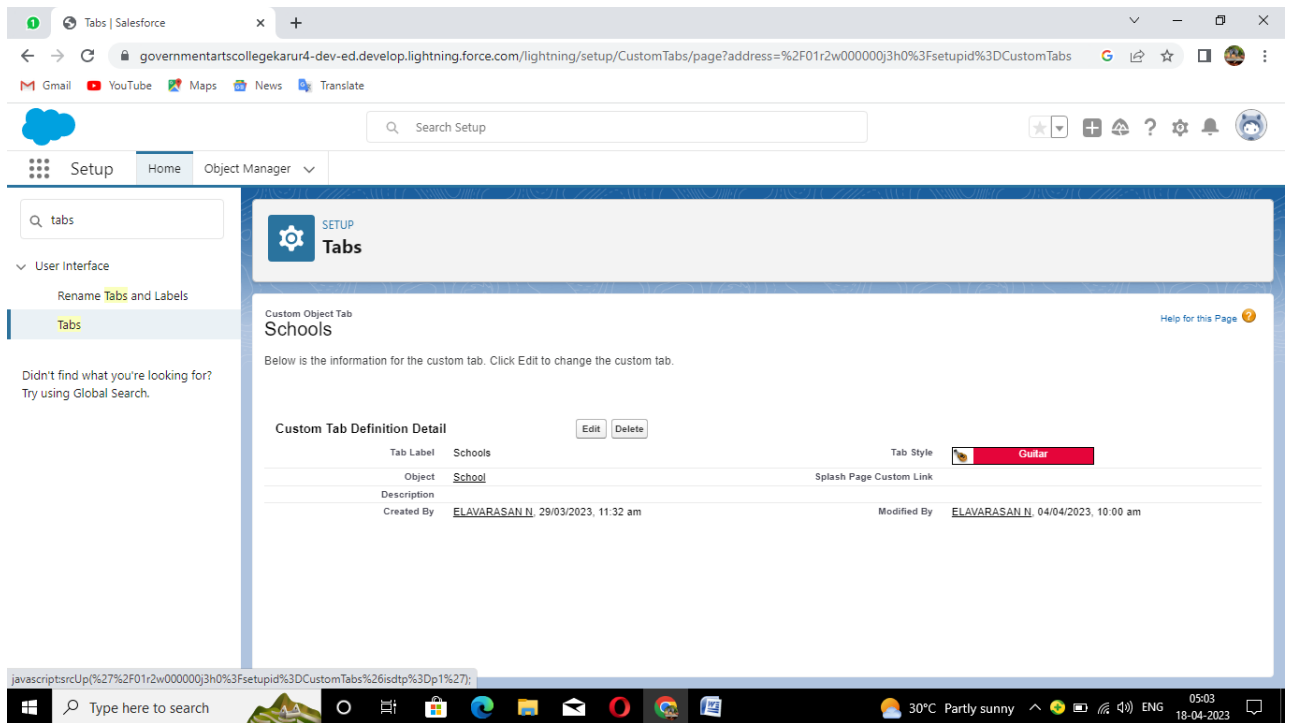
This screenshot shows the Salesforce Object Manager setup page for the 'Students' object. The browser address bar displays the URL: `governmentartscollegekarur4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cG0r/Details/view`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The left sidebar lists various configuration options under the 'Details' section, including Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area displays the 'Details' for the 'Students' object, with fields for Description, API Name (Students__c), Custom (checked), Singular Label (Students), and Plural Label (Students). On the right, there are checkboxes for Enable Reports (checked), Track Activities, and Track Field History. Below these, the Deployment Status is shown as 'Deployed', and the Help Settings link points to the Standard salesforce.com Help Window. The bottom of the screen shows a Windows taskbar with the search bar, application icons, and system tray information indicating 30°C, partly sunny weather, and the date 18-04-2023.



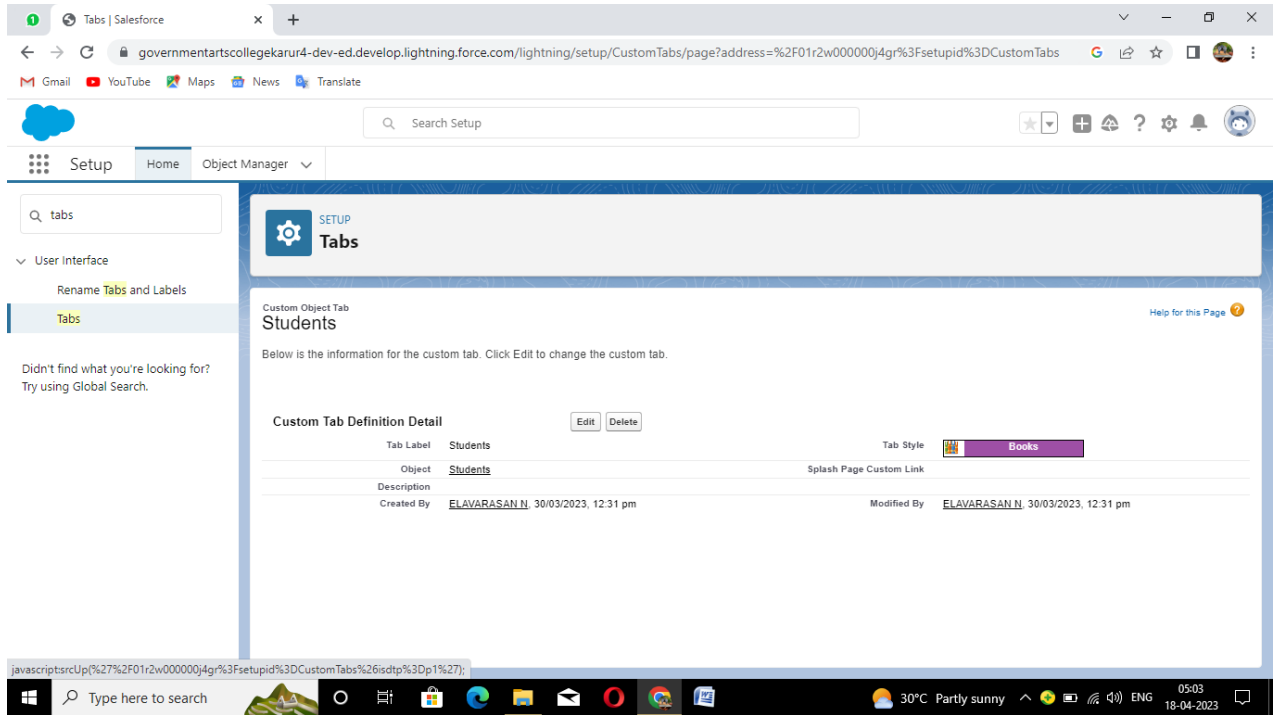
This screenshot shows the Salesforce Object Manager setup page for the 'Parent' object. The browser address bar displays the URL: `governmentartscollegekarur4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003cCfc/Details/view`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The left sidebar lists various configuration options under the 'Details' section, including Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area displays the 'Details' for the 'Parent' object, with fields for Description, API Name (parent__c), Custom (checked), Singular Label (Parent), and Plural Label (Parents). On the right, there are checkboxes for Enable Reports (checked), Track Activities, and Track Field History. Below these, the Deployment Status is shown as 'Deployed', and the Help Settings link points to the Standard salesforce.com Help Window. The bottom of the screen shows a Windows taskbar with the search bar, application icons, and system tray information indicating 30°C, partly sunny weather, and the date 18-04-2023.



The screenshot shows the Salesforce Setup interface for a custom tab named 'Parents'. The left sidebar contains a search bar and a list of categories under 'User Interface', with 'Tabs' selected. The main content area displays the 'Custom Tab Definition Detail' for the 'Parents' tab. The details include the tab label 'Parents', the object 'Parent', the description 'Parents', the created by user 'ELAVARASAN N.', the created date '29/03/2023, 11:33 am', the modified by user 'ELAVARASAN N.', the modified date '29/03/2023, 11:33 am', and the tab style 'Gears'. The 'Edit' and 'Delete' buttons are visible next to the details.

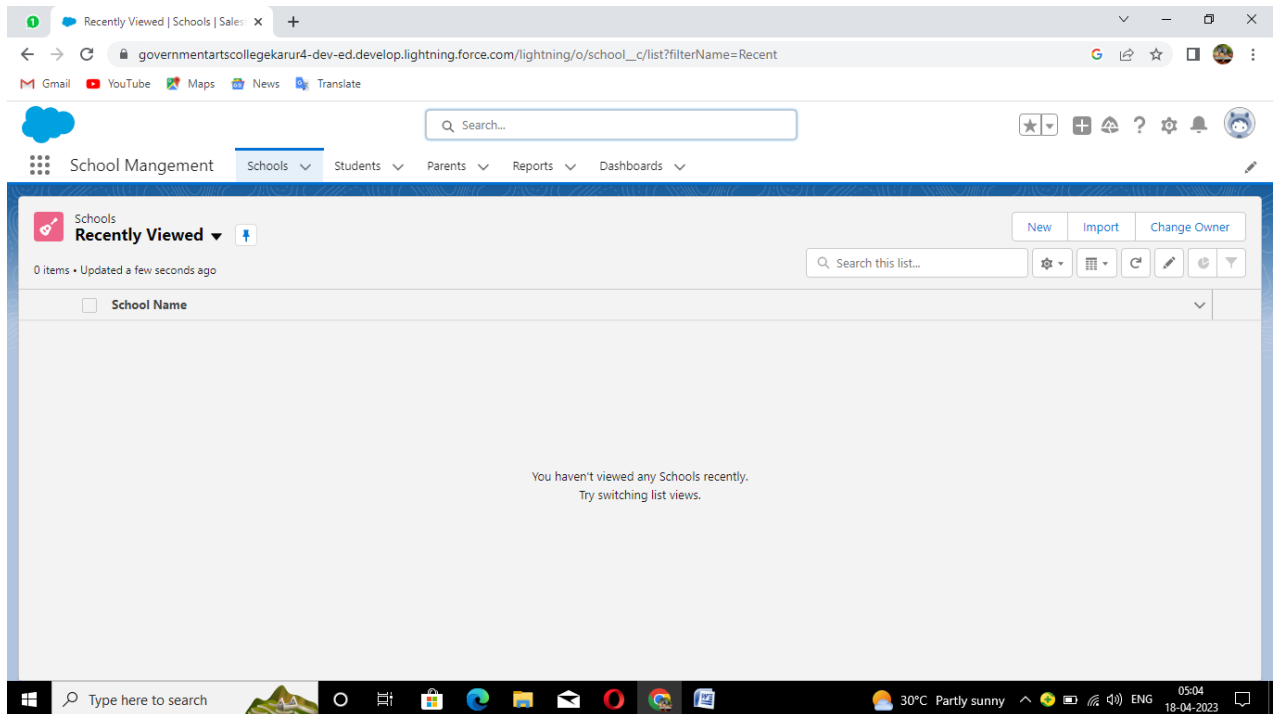


The screenshot shows the Salesforce Setup interface for a custom tab named 'Schools'. The left sidebar contains a search bar and a list of categories under 'User Interface', with 'Tabs' selected. The main content area displays the 'Custom Tab Definition Detail' for the 'Schools' tab. The details include the tab label 'Schools', the object 'School', the description 'Schools', the created by user 'ELAVARASAN N.', the created date '29/03/2023, 11:32 am', the modified by user 'ELAVARASAN N.', the modified date '04/04/2023, 10:00 am', and the tab style 'Guitar'. The 'Edit' and 'Delete' buttons are visible next to the details.



The screenshot shows the Salesforce Setup interface for Custom Tabs. The browser address bar displays the URL: `governmentartscollegekarur4-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w000000j4gr%3Fsetupid%3DCustomTabs`. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'SETUP Tabs' and displays the 'Students' custom tab details. The 'Custom Tab Definition Detail' table shows the following information:

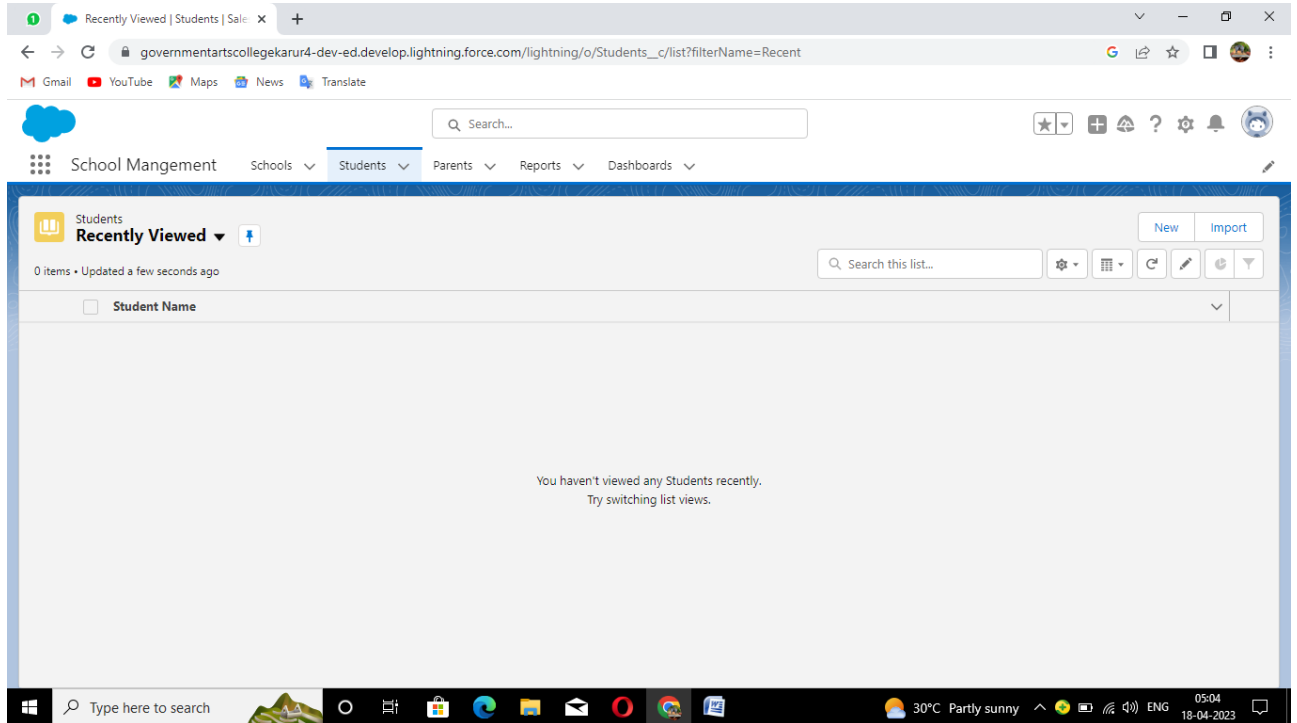
Tab Label	Students	Tab Style	Books
Object	Students	Splash Page Custom Link	
Description			
Created By	ELAVARASAN N, 30/03/2023, 12:31 pm		Modified By
			ELAVARASAN N, 30/03/2023, 12:31 pm



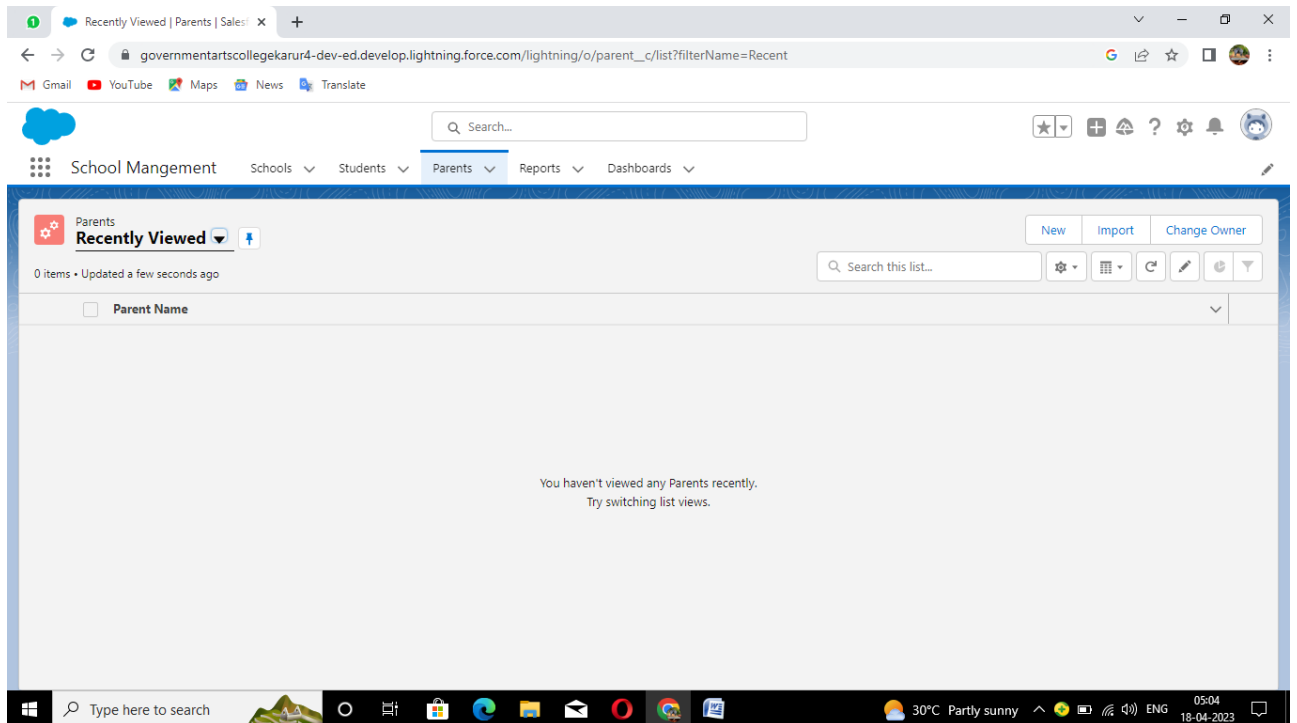
The screenshot shows the Salesforce School Management interface. The browser address bar displays the URL: `governmentartscollegekarur4-dev-ed.develop.lightning.force.com/lightning/o/school_c/list?filterName=Recent`. The left sidebar shows the navigation menu with 'School Mangement' selected. The main content area is titled 'Schools Recently Viewed' and displays a list of schools. The table has the following structure:

School Name

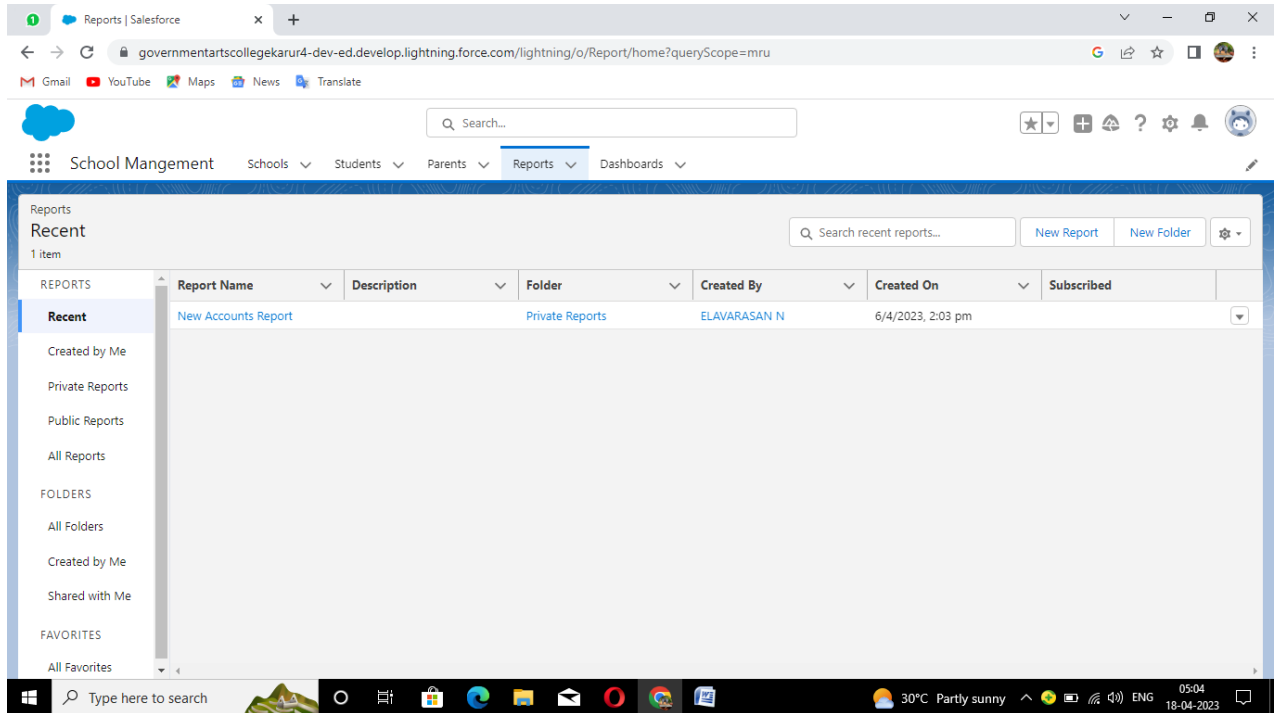
The page also includes a search bar and a message: 'You haven't viewed any Schools recently. Try switching list views.'



This screenshot shows the 'Students' section of the 'Recently Viewed' list in the School Management application. The interface includes a search bar, a table with one column labeled 'Student Name', and a message stating 'You haven't viewed any Students recently. Try switching list views.' The browser address bar shows the URL: `governmentartscollegekarur4-dev-ed.develop.lightning.force.com/lightning/o/Students_c/list?filterName=Recent`. The Windows taskbar at the bottom displays the search bar, task icons, and system tray information including 30°C, Partly sunny, and the date 18-04-2023.



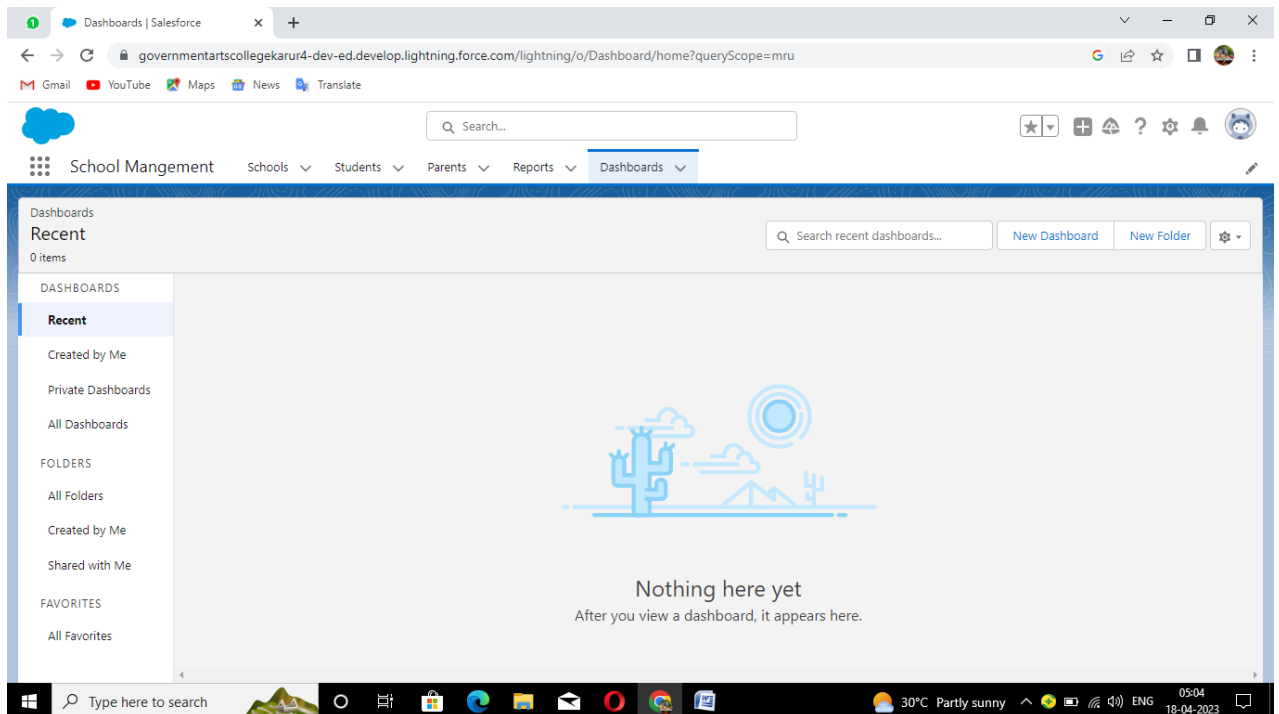
This screenshot shows the 'Parents' section of the 'Recently Viewed' list in the School Management application. The interface includes a search bar, a table with one column labeled 'Parent Name', and a message stating 'You haven't viewed any Parents recently. Try switching list views.' The browser address bar shows the URL: `governmentartscollegekarur4-dev-ed.develop.lightning.force.com/lightning/o/parent_c/list?filterName=Recent`. The Windows taskbar at the bottom displays the search bar, task icons, and system tray information including 30°C, Partly sunny, and the date 18-04-2023.



The screenshot shows the Salesforce Reports interface. The browser address bar displays the URL: `governmentartscollegekarur4-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru`. The page header includes a search bar and navigation tabs for School Mangement, Schools, Students, Parents, Reports, and Dashboards. The main content area is titled "Reports" and "Recent", showing a table with one report item:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Accounts Report		Private Reports	ELAVARASAN N	6/4/2023, 2:03 pm	

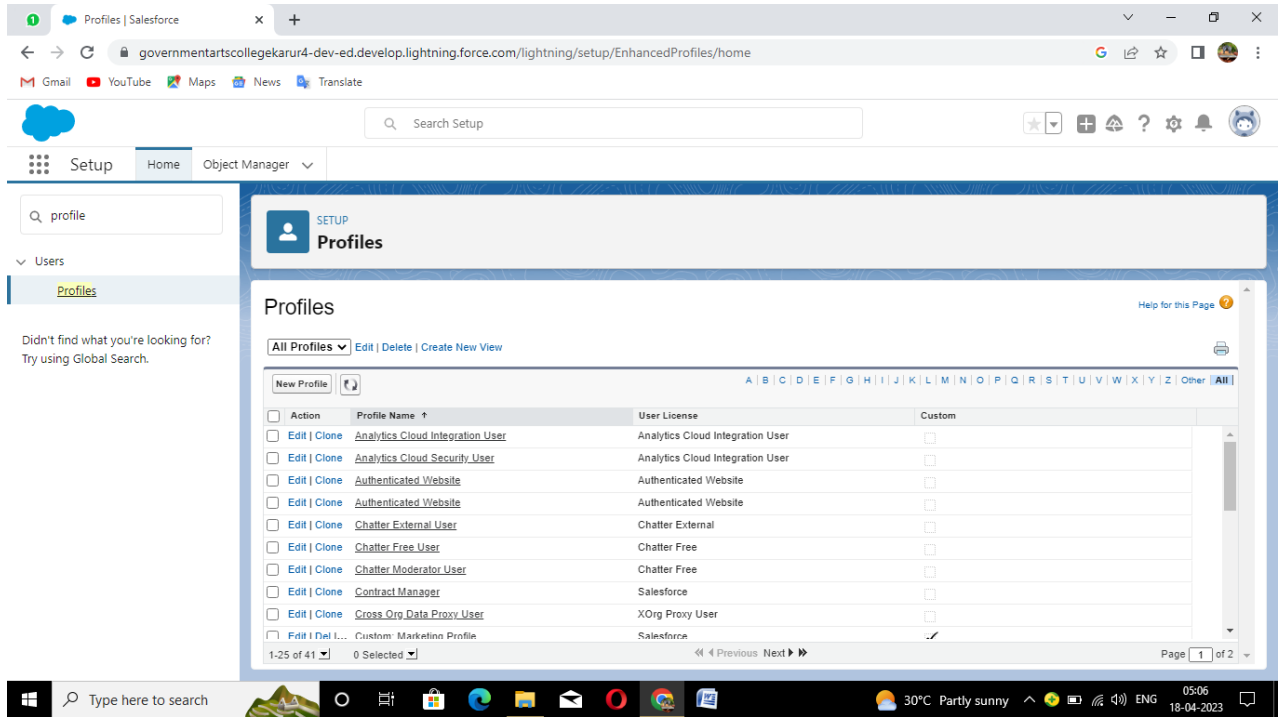
The left sidebar contains a navigation menu with sections: REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites).



The screenshot shows the Salesforce Dashboards interface. The browser address bar displays the URL: `governmentartscollegekarur4-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru`. The page header includes a search bar and navigation tabs for School Mangement, Schools, Students, Parents, Reports, and Dashboards. The main content area is titled "Dashboards" and "Recent", showing 0 items. A large illustration of a cactus and a sun is displayed with the text:

Nothing here yet
After you view a dashboard, it appears here.

The left sidebar contains a navigation menu with sections: DASHBOARDS (Recent, Created by Me, Private Dashboards, All Dashboards), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites).



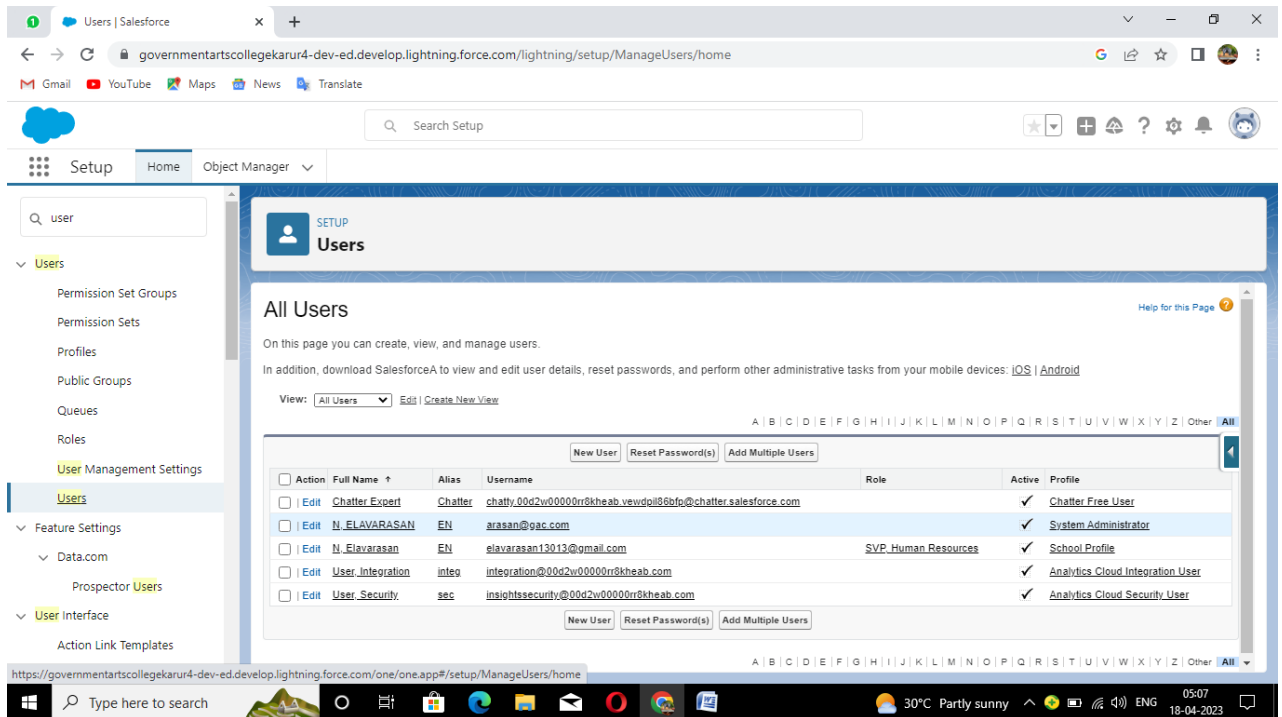
Profiles

On this page you can create, view, and manage profiles. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Profiles** | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Security User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>

1-25 of 41 | 0 Selected



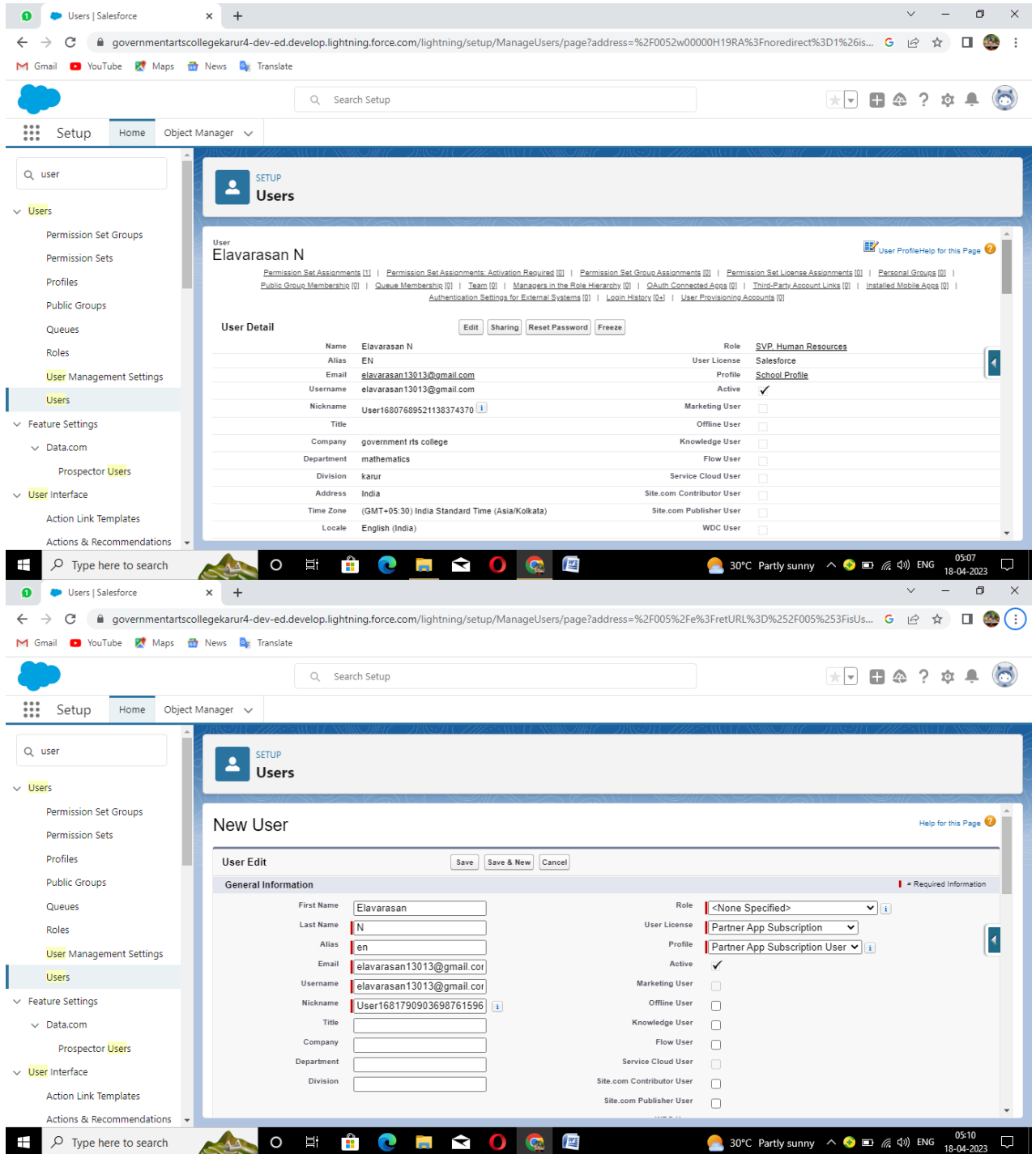
Users

On this page you can create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Users** | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2v00000r8kheab.vevd0l86bfc@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	N. ELAVARASAN	EN	arasan@gac.com		<input checked="" type="checkbox"/>	System Administrator
Edit	N. Elavarasan	EN	elavarasan13013@gmail.com	SVP_Human Resources	<input checked="" type="checkbox"/>	School Profile
Edit	User Integration	integ	integration@00d2v00000r8kheab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2v00000r8kheab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

1-25 of 41 | 0 Selected



The screenshot displays the Salesforce Setup interface for managing users. The left sidebar shows the navigation menu with 'Users' selected under 'User Management Settings'. The main content area shows the 'User Detail' for 'Elavarasan N'.

User Detail:

Name	Elavarasan N	Role	SVP_Human_Resources
Alias	EN	User License	Salesforce
Email	elavarasan13013@gmail.com	Profile	School Profile
Username	elavarasan13013@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16807689521138374370	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	government rts college	Knowledge User	<input type="checkbox"/>
Department	mathematics	Flow User	<input type="checkbox"/>
Division	karur	Service Cloud User	<input type="checkbox"/>
Address	India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>

The bottom screenshot shows the 'New User' form. The 'User Edit' section is active, and the 'General Information' tab is selected. The form fields are as follows:

User Edit - General Information:

First Name	Elavarasan	Role	<None Specified>
Last Name	N	User License	Partner App Subscription
Alias	en	Profile	Partner App Subscription User
Email	elavarasan13013@gmail.com	Active	<input checked="" type="checkbox"/>
Username	elavarasan13013@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User1681790903698761596	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>

Team Leader-

ELVARASAN . M

<https://trailblazer.me/id/ela53>

Team Member 1

ELAVARASAN . N

<https://trailblazer.me/id/elN54>

Team Member 2 -

GAYATHIRI .V

<https://trailblazer.me/id/gay55>

Team Member 3 –

HARIPRASATH . V

<https://trailblazer.me/id/hprasath56>

4 ADVANTAGES

1. Beneficial for different department or teams of the business
2. Customers are engaged across multiple channel
3. Provide streamline operations
4. Improve customer service
5. Data Mining
6. Helps in increasing sales
7. CRM made targeting and marketing simple
8. Improve decision making and productivity
9. CRM growing scope in the market
10. Centralized data makes everything Convenient
11. Tracking of customer data

5 DISADVANTAGES

1. A costly project
2. Loss of collected information records or
3. Not suitable for every business
4. It eliminates the human element
5. Can be accessed by third party
6. CRM is not fully customized
7. Have poor usability
8. Employee training is must
9. Having lots of security concerns
10. Centralized data is at stake
11. Experience based procedure in all the stages

6 APPLICATIONS

1. Tracking customers
2. Collecting Data for Marketing
3. Improving Interactions and communications
4. Streamlining Internal Sales Processes
5. Planning Your Operations.

7 CONCLUSION

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensures long-term customer loyalty

FUTURE SCOPE

“[The future of CRM] is about which companies will be able to pivot to meet the changing needs and trends – driven by customer expectations.